



# DupesPreventer

## **Use Cases**

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### Use Case: 1) New Configurations (Single Object)

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| <b>Description</b>    | DupesPreventer allows users to block or generate warnings for duplicate records in the salesforce org/sandbox.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Actors</b>         | Web UI or DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Preconditions</b>  | The 'Activate DupePreventer' checkbox of the DupesPreventer Status page must be turned ON.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Postconditions</b> | After the creation of DupesPreventer Configurations, On Every Insert/Update, the User will be able to block duplicates based on the configuration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>Admin will create a DupesPreventer Configurations on any standard SObjects Like Lead, Account, Contact as well as on cross-reference SObjects Like 'Lead-Account' or 'Lead-Contact' by selecting it from configuration type picklist.</li><li>Define 'Action on Insert' by selecting the appropriate value from the picklist</li><li>Define 'Action on Update' by selecting the appropriate value from the picklist</li><li>Define the rules based on which the configuration will be used for deduplication. To make this configuration more rigid, define filters with specific values or conditions.</li><li>The error field is mandatory for a new configuration when action is prevent insert and prevent update</li></ul> <p>Ex:</p> <ul style="list-style-type: none"><li>Create DupesPreventer Configurations on Lead</li><li>Action on Insert: 'Prevent Insert'</li><li>Action on Update: 'Prevent Update'.</li><li>DupesPreventer Rules is on email =: 'admin@gmail.com'.</li><li>DupesPreventer Filters in on Country = 'Canada'.</li></ul> |
| <b>Exceptions</b>     | If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200 then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected. To avoid this user will have to set batch size equal to 1 if user insert bulk records through DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Requirements</b>   | <ul style="list-style-type: none"><li>DupesPreventer will block duplicates records</li><li>DupesPreventer will create warnings for duplicate records.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

## Use Case: 2) Prevent Insert (Single Object)

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| <b>Description</b>    | DupesPreventer Prevent Insert Action allows Users to Prevent Insertion of Duplicate records in salesforce org/sandbox.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Actors</b>         | Manual or DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Preconditions</b>  | The 'Activate' checkbox of the DupesPreventer Detail page must be turned ON.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Postconditions</b> | Blocks insert and provide a message to the user that a duplicate was found with an Id to the matched record                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>Admin will create DupesPreventer Configurations on Lead by selecting it from the configuration type picklist.</li><li>Define 'Action on Insert' by selecting the appropriate value from the picklist</li><li>Define 'Action on Update' by selecting the appropriate value from the picklist</li><li>Define the rules based on which the configuration will be used for deduplication.</li><li>To make this configuration more rigid, define filters with specific values or conditions.</li><li>The error field is mandatory for a new configuration when action is prevent insert and prevent update.</li></ul> <p>Eg:</p> <ul style="list-style-type: none"><li>Create DupesPreventer Configurations on Lead</li><li>Action on Insert: 'Prevent Insert'</li><li>Action on Update: 'Prevent Update'.</li><li>DupesPreventer Rules is on email = 'admin@gmail.com'.</li><li>DupesPreventer Filters in on Country = 'Canada'.</li></ul> <p>Once the DupesPreventer Configurations is complete. User inserts one record with FirstName= 'jack' ,LastName= 'spiro', email = 'admin@gmail.com' and country = 'canada', company='BNT' &amp; status=' Closed – Converted'</p> <p>Records get saved successfully and codes get generated. Clone the same Lead and try to save it, Now this record is prevented from saving as the Action was "Prevent Insert" in the configuration.</p> <p>DupesPreventer shows a message with an Id to the matched record.</p> |
| <b>Exceptions</b>     | If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200, then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected. To avoid this user will have to set batch size equal to 1 if user insert bulk records through DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Requirements</b>   | DupesPreventer will block duplicates records.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

### Use Case: 3) Prevent Update (Single Object)

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| <b>Description</b>    | DupesPreventer Prevent Update Action allows Users to prevent updating of Duplicate records in salesforce org/sandbox.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Actors</b>         | Manual or DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Preconditions</b>  | The 'Activate' checkbox of the DupesPreventer Detail page must be turned ON.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Postconditions</b> | Blocks update and provide a message to the user that a duplicate was found with an Id to the matched record.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>Admin will create DupesPreventer Configurations on Lead by selecting it from the configuration type picklist.</li><li>Define 'Action on Insert' by selecting the appropriate value from the picklist</li><li>Define 'Action on Update' by selecting the appropriate value from the picklist</li><li>Define the rules based on which the configuration will be used for deduplication.</li><li>To make this configuration more rigid, define filters with specific values or conditions.</li></ul> <p>Ex:</p> <ul style="list-style-type: none"><li>Create DupesPreventer Configurations on Lead</li><li>Action on Insert: 'Prevent Insert'</li><li>Action on Update: 'Prevent Update'.</li><li>DupesPreventer Rules is on email =: 'jack@gmail.com'.</li><li>DupesPreventer Filters in on Country = 'Canada'.</li></ul> <p>Create new Lead with LastName= 'Obama' , company='BNT' , status=' Closed – Converted' Email = 'james@gmail.com', Country = 'Canada' &amp; Save it. Now Create another new Lead with LastName= 'Trump' , company='BNT-SOFT' , status=' Closed – Converted' email= 'john@gmail.com' , Country = 'India' &amp; Save it. Now edit this existing lead and update its email from = 'john@gmail.com' to 'james@gmail.com' , then page will show an error. This record is prevented from saving as the Action was "Prevent Update" in the configuration.</p> <p>DupesPreventer shows a message with a the existing duplicate Id to the matched record.</p> |
| <b>Exceptions</b>     | If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200, then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected. To avoid this user will have to set batch size equal to 1 if user insert bulk records through DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Requirements</b>   | DupesPreventer will block duplicates                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

#### Use Case: 4) Report Duplicate (Single Object)

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| <b>Description</b>    | DupesPreventer Report Duplicate Action allows Users to generate warnings for duplicate records in salesforce org/sandbox.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Actors</b>         | Manual / DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Preconditions</b>  | The ' <b>Activate</b> ' checkbox of the DupesPreventer Detail page must be turned ON.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Postconditions</b> | After the creation of DupesPreventer Configurations, Report Duplicate shows a warning and probable duplicate is created                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>Admin will create DupesPreventer Configurations on Lead by selecting it from the configuration type picklist.</li><li>Define 'Action on Insert' by selecting the appropriate value from the picklist</li><li>Define 'Action on Update' by selecting the appropriate value from the picklist</li><li>Define the rules based on which the configuration will be used for deduplication.</li><li>To make this configuration more rigid, define filters with specific values or conditions.</li></ul> <p>Ex</p> <ul style="list-style-type: none"><li>Create DupesPreventer Configurations on Lead</li><li>Action on Insert: 'Report Duplicate'</li><li>Action on Update: 'Report Duplicate'.</li><li>DupesPreventer Rules is on email =: 'jack@gmail.com'.</li><li>DupesPreventer Filters in on Country = 'Canada'</li></ul> <p>Create new Lead with LastName= 'Winslet' , company='BNT' , status=' Closed - Converted' Email = 'jack@gmail.com', Country = 'Canada' &amp; Save it. Now Create another new Lead with LastName= 'Bush' , company='BNT-SOFT' , status=' Closed – Not Converted' , email= ' jack@gmail.com' &amp; Country = 'Canada' Save it. So DupesPreventer will create duplicate warning as the Action was 'Report Duplicate' in the configuration. DupesPreventer shows 'Probable Duplicates' and 'Duplicate Warnings' in a related list of the DupesPreventer Configuration details page.</p> |
| <b>Exceptions</b>     | If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200, then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected. To avoid this user will have to set batch size equal to 1 if user insert bulk records through DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Requirements</b>   | DupesPreventer will create warnings for duplicate records.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

### Use Case: 5) New Configurations (Cross Object)

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|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>    | DupesPreventer allows users to block or generate warnings for duplicate records in the salesforce org/sandbox.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Actors</b>         | Manual or DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Preconditions</b>  | The 'Activate DupePreventer ' checkbox of the DupesPreventer Status page must be turned ON.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Postconditions</b> | After the creation of DupesPreventer Configurations, On Every Insert/Update, the User will be able to block/warn duplicates based on the configuration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>Admin will create a DupesPreventer Configurations on any standard SObjects Like on cross-reference SObjects 'Lead-Account' or 'Lead-Contact' by selecting it from configuration type picklist.</li><li>Define 'Action on Insert' by selecting the appropriate value from the picklist</li><li>Define 'Action on Update' by selecting the appropriate value from the picklist</li><li>Define the rules based on which the configuration will be used for deduplication.</li><li>To make this configuration more rigid, define filters with specific values or conditions.</li><li>The error field is mandatory for the new configuration.</li></ul> <p>Ex:</p> <ul style="list-style-type: none"><li>create DupesPreventer Configurations on Lead To Account.</li><li>Action on Insert : 'Prevent Insert'</li><li>Action on Update:'Prevent Update'.</li><li>DupesPreventer Rules : Match Field =company ,Mapping Type = 'Exact' &amp; Account Match Field = 'Account Name'</li><li>DupesPreventer Filter: For creating Rules Admin will have select three fields.<br/>Match Fields: This field is related to 'Lead'.<br/>Mapping Type: These fields decide actions.<br/>Contact Match Field: This field is related to Account.</li></ul> <p>In this case we will not provide filter, but user will try to apply filter depending on his/her requirment.<br/>Suppose there will be already account present with AccountName: BNT, &amp; user will insert fresh new lead with LastName= 'Lara' , company='BNT' , status='Closed - Converted' then DupesPreventer will not allow to save this lead , beacause Leads company equals to Account Name &amp; in this case AccountName: BNT is already present.</p> |
| <b>Exceptions</b>     | If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200, then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Requirements</b>   | <ul style="list-style-type: none"><li>DupesPreventer will block duplicates records</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

### Use Case: 6) Prevent Insert (Cross Object)

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|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>    | DupesPreventer Prevent Insert Action allows Users to Prevent Insertion of Duplicate records in salesforce org.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Actors</b>         | Manual or DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Preconditions</b>  | <ul style="list-style-type: none"><li>The '<b>Activate</b>' checkbox of the DupesPreventer Detail page must be turned ON.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Postconditions</b> | After the creation of DupesPreventer Configurations, On Every Insert, the User will be able to block duplicates based on the configuration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>Admin will create DupesPreventer Configurations on 'Lead To Contact' by selecting it from the configuration type picklist.</li><li>Define 'Action on Insert' by selecting the appropriate value from the picklist</li><li>Define 'Action on Update' by selecting the appropriate value from the picklist</li><li>Define the rules based on which the configuration will be used for deduplication.</li><li>To make this configuration more rigid, define filters with specific values or conditions.</li><li>Ex:<ul style="list-style-type: none"><li><b>Dupes-Preventer Configurations</b><ul style="list-style-type: none"><li><b>DupesPreventer Configuration Name:</b> 'Configure'</li><li><b>Action on Insert:</b> 'Prevent Insert'</li><li><b>Action on Update:</b> 'Prevent Update'</li><li><b>Configuration Type:</b> 'Lead to Contact'</li><li><b>Error Message:</b> 'Prevent Insertion of Duplicate records'</li></ul></li><li><b>DupesPreventer Rules:</b><ul style="list-style-type: none"><li><b>Match Field:</b> 'City' [<i>Lead match field</i>]</li><li><b>Mapping Type:</b> 'Exact'</li><li><b>Contact Match Field:</b> 'Mailing City' [<i>Contact match field</i>]<br/>Here let's consider city is =: '<b>Toronto</b>'.</li></ul></li><li><b>DupesPreventer Filters</b><ul style="list-style-type: none"><li><b>Filtered Object:</b> 'Lead'</li><li><b>Filtered Field Name:</b> 'Company'</li><li><b>Operator:</b> '='</li><li><b>Filter Criteria:</b> 'BBC'<br/>Here let's Consider Company = '<b>BBC</b>'.</li></ul></li></ul></li></ul> <p>Once the DupesPreventer Configurations is complete. Then Admin insert one record on <b>Lead</b> with LastName= 'Kate', city = 'Toronto' and company = 'BBC'.Records get saved successfully and codes get generated. After that if Admin will insert new <b>contact</b> with LastName = 'Mike', mailing city = ' Toronto' and try to save it, Now this record is prevented from saving as the Action was "Prevent Insert" in the configuration.</p> <p>In Configuration type 'Lead to Contact',<br/>It <b>prevent the insertion of Lead records</b> whose city = 'Toranto' &amp; Filter = 'BBC' if record with mailing city = 'Toranto' found already exists in contact &amp;</p> |

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|                     | <p>Similarly,</p> <p>It also <b>prevent insertion of contact records</b> whose mailing city = 'Toronto' if record with city = 'Toronto' &amp; Filter = 'BBC' found already exists in Lead.</p> <p>Once it prevents the Insertion of records it displays the Error Message = 'Prevent Insertion of Duplicate records' on-screen along with the Id's of those existing records because of whom this insertion is not occurring.</p> |
| <b>Exceptions</b>   | If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200, then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected.                                                                                                                                                                                                 |
| <b>Requirements</b> | DupesPreventer will block duplicates records from insertion.                                                                                                                                                                                                                                                                                                                                                                      |

### Use Case: 7) Prevent Update (Cross Object)

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|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>    | DupesPreventer Prevent Update Action allows Users to prevent updating of Duplicate records in salesforce org.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Actors</b>         | Manual or DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Preconditions</b>  | <ul style="list-style-type: none"> <li>The 'Activate' checkbox of the DupesPreventer Detail page must be turned ON.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Postconditions</b> | After the creation of DupesPreventer Configurations, On Every Update, the User will be able to block duplicates based on the configuration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Flow</b>           | <ul style="list-style-type: none"> <li>Admin will create DupesPreventer Configurations on 'Lead To Contact' by selecting it from the configuration type picklist.</li> <li>Define 'Action on Insert' by selecting the appropriate value from the picklist</li> <li>Define 'Action on Update' by selecting the appropriate value from the picklist</li> <li>Define the rules based on, which the configuration will be used for deduplication.</li> <li>To make this configuration more rigid, define filters with specific values or conditions.</li> <li>Ex: <ul style="list-style-type: none"> <li><b>Dupes-Preventer Configurations</b> <ul style="list-style-type: none"> <li><b>DupesPreventer Configuration Name:</b> 'Configure'</li> <li><b>Action on Insert:</b> 'Prevent Insert'</li> <li><b>Action on Update:</b> 'Prevent Update'</li> <li><b>Configuration Type:</b> 'Lead to Contact'</li> <li><b>Error Message:</b> 'Prevent Updating of Duplicate records'</li> </ul> </li> <li><b>DupesPreventer Rules:</b> <ul style="list-style-type: none"> <li><b>Match Field:</b> 'City' [<i>Lead match field</i>]</li> <li><b>Mapping Type:</b> 'Exact'</li> <li><b>Contact Match Field:</b> 'Mailing City' [<i>Contact match field</i>]<br/>Here let's consider city is =: 'Toronto'.</li> </ul> </li> <li><b>DupesPreventer Filters</b> <ul style="list-style-type: none"> <li><b>Filtered Object:</b> 'Lead'</li> <li><b>Filtered Field Name:</b> 'Company'</li> <li><b>Operator:</b> '='</li> <li><b>Filter Criteria:</b> 'BBC'<br/>Here let's Consider Company = 'BBC'.</li> </ul> </li> </ul> </li> </ul> <p><b>Case 1: From Lead to Contact:</b><br/>Create a new Lead record with LastName= 'Kate', city = 'Toronto' and company = 'BBC' and save it.<br/>Similarly, also create a new contact record with LastName= 'Paul', mailing city = 'Vancouver' and save it.<br/>Now when user edit this existing contact record and try to update mailing city from 'Vancouver' to 'Toronto', the record is prevented from updating because the same city = 'Toronto' with company = 'BBC' already exists in Lead record</p> |

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|                     | <p><b>Case 2: From Contact to Lead:</b></p> <p>Create a new contact record with LastName= 'Paul', mailing city = 'Toronto' &amp; save it.</p> <p>Similarly, also create the new lead record with LastName= 'Kate', city = 'Vancouver' and company = 'BBC' &amp; save it.</p> <p>Now when user edit this existing lead record and try to update city = 'Vancouver' to 'Toronto', the record is prevented from updating because same mailing city = 'Toronto' already exists in a contact record</p> <p>Thus this record was prevented from updating as Action was "Prevent Update" in the configuration.</p> <p>Once it prevents the Updating of existing records it displays the Error Message = 'Prevent Updating of Duplicate records' on-screen along with the Id's of those existing records because of whom this Updating has not occurred.</p> |
| <b>Exceptions</b>   | If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200, then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Requirements</b> | DupesPreventer will block duplicates records from updating.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |



### Use Case: 8) Report Duplicate (Cross Object)

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| <b>Description</b>    | DupesPreventer Report Duplicate Action allows Users to generate warnings and probable duplicates for duplicate records in salesforce org.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Actors</b>         | Manual or DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Preconditions</b>  | <ul style="list-style-type: none"><li>The '<b>Activate</b>' checkbox of the DupesPreventer Detail page must be turned ON.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Postconditions</b> | After the creation of DupesPreventer Configurations, On Every 'Report Duplicate', the User will be able to warn duplicates based on the configuration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>Admin will create DupesPreventer Configurations on Lead To Contact by selecting it from the configuration type picklist.</li><li>Define 'Action on Insert' by selecting the appropriate value from the picklist</li><li>Define 'Action on Update' by selecting the appropriate value from the picklist</li><li>Define the rules based on, which the configuration will be used for deduplication.</li><li>To make this configuration more rigid, define filters with specific values or conditions.</li><li>Ex:<ul style="list-style-type: none"><li><b>DupesPreventer Configurations</b><ul style="list-style-type: none"><li><b>DupesPreventer Configuration Name:</b> 'Configure'</li><li><b>Action on Insert:</b> 'Report Duplicate'</li><li><b>Action on Update:</b> 'Report Duplicate'.</li><li><b>Configuration Type:</b> 'Lead to Contact'</li></ul></li><li><b>DupesPreventer Rules:</b><ul style="list-style-type: none"><li><b>Match Field:</b> 'City' [<i>Lead match field</i>]</li><li><b>Mapping Type:</b> 'Exact'</li><li><b>Contact Match Field:</b> 'Mailing City' [<i>Contact match field</i>]<br/>Here let's consider city is =: 'Toronto'.</li></ul></li><li><b>DupesPreventer Filters</b><ul style="list-style-type: none"><li><b>Filtered Object:</b> 'Lead'</li><li><b>Filtered Field Name:</b> 'Company'</li><li><b>Operator:</b> '='</li><li><b>Filter Criteria:</b> 'BBC'<br/>Here let's Consider Company = 'BBC'.</li></ul></li></ul></li></ul> <p>Create a new <b>Lead</b> record with LastName= 'Kate', city = 'Toronto' and Company = 'BBC' and save it. Now when the user tries to insert new <b>contact</b> with LastName= 'Paul', mailing city = 'Toronto', then Dupes-Preventer will allow saving records while generating '<b>Probable Duplicates</b>' and '<b>Duplicate Warnings</b>' on the home page of the DupesPreventer Configuration details page.</p> |

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|                     | <p>Similarly, create a new <b>Contact</b> record with LastName= 'Paul', mailing city =: 'Toronto' &amp; save it. Now when user try to insert new <b>lead</b> with LastName= 'Kate', city = 'Toronto' and Company = 'BBC' .Then Dupes-Preventer will allow saving records while generating '<b>Probable Duplicates</b>' and '<b>Duplicate Warnings</b>' on the home page of the DupesPreventer Configuration details page.</p> |
| <b>Exceptions</b>   | <p>If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200, then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected.</p>                                                                                                                                                                                      |
| <b>Requirements</b> | <p>DupesPreventer will create warnings for duplicate records.</p>                                                                                                                                                                                                                                                                                                                                                             |



### Use Case: 9) Reconfiguration in Lightning Mode

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| <b>Description</b>    | DupesPreventer Reconfiguration component configures the codes against record created earlier that qualify configuration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Actors</b>         | Admin/Users                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Preconditions</b>  | <ul style="list-style-type: none"><li>• At least one rule / configuration must be present on any configuration.</li><li>• MyDomain must be registered for org.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Postconditions</b> | After the creation of DupesPreventer Configurations, On Every rule Lightning Component create codes and run Batch for it.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>• Admin/User will create DupesPreventer Configurations on Lead by selecting it from the configuration type picklist.</li><li>• Define 'Action on Insert' by selecting the appropriate value from the picklist</li><li>• Define 'Action on Update' by selecting the appropriate value from the picklist</li><li>• Define the rules based on which the configuration will be used for deduplication.</li><li>• To make this configuration more rigid, define filters with specific values or conditions.</li><li>• Let's take two examples, one to prevent insert and others for report duplicate.</li></ul> <p>Ex:1</p> <ul style="list-style-type: none"><li>• On Every update or on every addition of new rules or filter , Reconfiguration component is visible to user for indicating purpose of user configuration needs to be hits Reconfigure component.</li></ul><br><ul style="list-style-type: none"><li>• Create DupesPreventer Configurations on Lead</li><li>• Action on Insert : 'Prevent Insert'</li><li>• Action on Update: 'Prevent Update'.</li><li>• DupesPreventer Rules is on LastName =: ' James'.</li><li>• DupesPreventer Filters in on Industry = 'Banking'.</li></ul> <p>Insert one Lead with LastName ='James' Industry = 'Banking'. The lead gets inserted. If you want to Reconfigure the records then you have to click on Reconfigur code Lightning component</p> |
| <b>Exceptions</b>     | If My Domain name is not registered it will not show reconfiguration code lightning component.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Requirements</b>   | <ul style="list-style-type: none"><li>• Update or Create one new Rule or Filter for visibility of reconfiguration code lightning component.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

### Use Case: 10) Reconfiguration in Classic Mode

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| <b>Description</b>    | DupesPreventer Reconfiguration Button configures the codes against record created earlier that qualify configuration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Actors</b>         | Admin/Users                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Preconditions</b>  | <ul style="list-style-type: none"><li>At least one rule / configuration must be present on any configuration.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Postconditions</b> | After the creation of DupesPreventer Configurations, On Every insert / update rule or filter reconfiguration button will appear for indication of user configuration needs to reconfigure new records                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>Admin/User will create DupesPreventer Configurations on Lead by selecting it from the configuration type picklist.</li><li>Define 'Action on Insert' by selecting the appropriate value from the picklist</li><li>Define 'Action on Update' by selecting the appropriate value from the picklist</li><li>Define the rules based on, which the configuration will be used for deduplication.</li><li>To make this configuration more rigid, define filters with specific values or conditions.</li><li>Let's take two examples, one to prevent insert and others for report duplicate.</li></ul> <p>Ex:1</p> <ul style="list-style-type: none"><li>Suppose there is one configuration present on Lead.</li><li>Action on Insert : Prevent Insert.</li><li>Action on Update : Report Duplicate</li><li>Rules : LastName Exact</li></ul> <p>After creation of configuration , if user wish to add new rule on company then user add that rules for deduplication purpose. Once the user will add new rule on same configuration , then Reconfigure code button shows on the page. That means User needs to reconfigure records &amp; create new new Codes for Deduplication purpose.</p> |
| <b>Exceptions</b>     | On every creation of new configuraion , user need to hits Reconfigure code button to better performance of DupesPreventer.<br>If user miss to hits Reconfigure code button on every creation of configuraion then DupesPreventer will not work properly.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Requirements</b>   | <ul style="list-style-type: none"><li>Update or Create one new Rule or Filter for visibility of reconfiguration code button.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

### Use Case: 11) DupePreventer's Probable Duplicates

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| <b>Description</b>    | DupesPreventer Probable Duplicates allows User to observe Probable duplicate records in salesforce org.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Actors</b>         | Manual or DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Preconditions</b>  | <ul style="list-style-type: none"> <li>The '<b>Activate DupePreventer</b>' checkbox of the DupesPreventer Status page must be turned ON.</li> <li>The '<b>Activate</b>' checkbox of the DupesPreventer Detail page must be turned ON.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Postconditions</b> | After the creation of DupesPreventer Configurations, On Every 'Report Duplicate' the User will generate 'Probable Duplicates' of Duplicate records                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Flow</b>           | <ul style="list-style-type: none"> <li>Admin will create DupesPreventer Configurations on Lead To Contact by selecting it from the configuration type picklist.</li> <li>Define 'Action on Insert' by selecting the appropriate value from the picklist</li> <li>Define 'Action on Update' by selecting the appropriate value from the picklist</li> <li>Define the rules based on, which the configuration will be used for deduplication.</li> <li>To make this configuration more rigid, define filters with specific values or conditions.</li> <li>Ex:1 <ul style="list-style-type: none"> <li><b>Dupes-Preventer Configurations</b> <ul style="list-style-type: none"> <li><b>DupesPreventer Configuration Name:</b> 'Configure'</li> <li><b>Action on Insert :</b> 'Report Duplicate'</li> <li><b>Action on Update:</b> 'Report Duplicate'.</li> <li><b>Configuration Type:</b> 'Lead to Contact'</li> </ul> </li> <li><b>DupesPreventer Rules:</b> <ul style="list-style-type: none"> <li><b>Match Field:</b> 'City' [<i>Lead match field</i>]</li> <li><b>Mapping Type:</b> 'Exact'</li> <li><b>Contact Match Field:</b> 'Mailing City' [<i>Contact match field</i>]<br/>Here let's consider city is =: 'Toronto'.</li> </ul> </li> <li><b>DupesPreventer Filters</b> <ul style="list-style-type: none"> <li><b>Filtered Object:</b> 'Lead'</li> <li><b>Filtered Field Name:</b> 'Company'</li> <li><b>Operator:</b> '='</li> <li><b>Filter Criteria:</b> 'BBC'<br/>Here let's Consider Company = 'BBC'.</li> </ul> </li> </ul> </li> </ul> <p>Create new Lead with LastName= 'Pitter', city = 'Toronto' and Company = 'BBC' &amp; save it. Now create new contact with LastName= 'adam', mailing city = 'Toronto' &amp; save it. Then Dupes-Preventer will allow user to save records while generating '<b>Probable Duplicates</b>' and '<b>Duplicate Warnings</b>' on the home page</p> |

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|                     | <p>of DupesPreventer Configuration details page.</p> <ul style="list-style-type: none"> <li> <b>DupesPreventor Probable Duplicate Detail:</b> <ul style="list-style-type: none"> <li>DupesPreventor Probable Duplicates Name:Dupe-1</li> <li>DupesPreventor Duplicate Warning: <b>Warning:0</b></li> <li>DupesPreventor Configuration: Configure [<i>Configuration Name</i>]</li> <li>Configuration Type: Lead</li> <li>code: 1  Toronto</li> <li>Duplicate Record: Pitter <b>at BBC</b>[<i>Lead Name at Company</i>]</li> <li>LeadId :00Q</li> <li>Object Type: Lead</li> <li>Lead: Pitter, BBC [<i>Lead Name, Company</i>]</li> </ul> </li> <li> <b>DupesPreventor Probable Duplicate Detail:</b> <ul style="list-style-type: none"> <li>DupesPreventor Probable Duplicates Name: Dupe-2</li> <li>DupesPreventor Duplicate Warning: <b>Warning:0</b></li> <li>DupesPreventor Configuration: Configure [<i>Configuration Name</i>]</li> <li>Configuration Type:Contact</li> <li>code: 1  Toronto</li> <li>Duplicate Record: adam [<i>Contact Name</i> ]</li> <li>ContactId :00Q</li> <li>Object Type: Contact</li> <li>Contact: adam [<i>Contact Name</i> ]</li> <li></li> </ul> </li> </ul> |
| <b>Exceptions</b>   | If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200, then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Requirements</b> | DupesPreventer Probable Duplicates will show warnings for duplicate records.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

## Use Case: 12) DupePreventer's Duplicate Warning

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| <b>Description</b>    | DupesPreventer Duplicate Warning allows Users to observe Duplicate Warning records in salesforce org.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Actors</b>         | Manual or DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Preconditions</b>  | <ul style="list-style-type: none"> <li>The '<b>Activate DupePreventer</b>' checkbox of the DupesPreventer Status page must be turned ON.</li> <li>The '<b>Activate</b>' checkbox of the DupesPreventer Detail page must be turned ON.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Postconditions</b> | After the creation of DupesPreventer Configurations, On Every Report Duplicate the User will be able to warn duplicates records based on the configuration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Flow</b>           | <ul style="list-style-type: none"> <li>Admin will create DupesPreventer Configurations on Lead To Contact by selecting it from the configuration type picklist.</li> <li>Define 'Action on Insert' by selecting the appropriate value from the picklist</li> <li>Define 'Action on Update' by selecting the appropriate value from the picklist</li> <li>Define the rules based on, which the configuration will be used for deduplication.</li> <li>To make this configuration more rigid, define filters with specific values or conditions.</li> <li>Ex:1 <ul style="list-style-type: none"> <li><b>Dupes-Preventer Configurations</b> <ul style="list-style-type: none"> <li><b>DupesPreventer Configuration Name:</b> 'Configure'</li> <li><b>Action on Insert :</b> 'Report Duplicate'</li> <li><b>Action on Update:</b> 'Report Duplicate'.</li> <li><b>Configuration Type:</b> 'Lead to Contact'</li> </ul> </li> <li><b>DupesPreventer Rules</b> <ul style="list-style-type: none"> <li><b>Match Field:</b> 'City' [<i>Lead Match Field</i>]</li> <li><b>Mapping Type:</b> 'Exact'</li> <li><b>Contact Match Field:</b> 'Mailing City' [<i>Contact Match Field</i>]<br/>Here let's consider city is =: 'Toronto'.</li> </ul> </li> <li><b>DupesPreventer Filters</b> <ul style="list-style-type: none"> <li><b>Filtered Object:</b> 'Lead'</li> <li><b>Filtered Field Name:</b> 'Company'</li> <li><b>Operator:</b> '='</li> <li><b>Filter Criteria:</b> 'BBC'<br/>Here let's Consider Company = 'BBC'.</li> </ul> </li> </ul> </li> </ul> <p>Create new Lead with LastName= 'Pitter', city = 'Toronto' and Company = 'BBC' &amp; save it.Now create new contact with LastName= 'adam',mailing city = 'Toronto' &amp; save it.Then Dupes-Preventer will allow user to save records while generating '<b>Probable Duplicates</b>' and '<b>Duplicate Warnings</b>' on the home page of DupesPreventer Configuration details page.</p> <ul style="list-style-type: none"> <li><b>Dupes Preventor Duplicate Warning</b> <ul style="list-style-type: none"> <li>DupesPreventor Duplicate Warning Name: Warning No. : 0</li> </ul> </li> </ul> |

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|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                     | <ul style="list-style-type: none"> <li>• Configuration Type: Lead to Contact</li> <li>• DupesPreventor Configuration: Configure</li> <li>• code: 1  Toronto</li> <li>• Triggering Action: Duplicate Found on Update</li> <li>• DupesPreventor Configuration: Configure [<i>Configuration Name</i>] <ul style="list-style-type: none"> <li>• <u>Dupe-1</u> <ul style="list-style-type: none"> <li>• Object Type: Lead</li> <li>• Duplicate Record: Pitter at BBC [<i>Lead Name at Company</i>]</li> </ul> </li> <li>• <u>Dupe-2</u> <ul style="list-style-type: none"> <li>• Object Type: Contact</li> <li>• Duplicate Record: adam [<i>Contact Name</i>]</li> </ul> </li> </ul> </li> </ul> |
| <b>Exceptions</b>   | If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200, then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected.                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Requirements</b> | DupesPreventer Duplicate Warning will show warnings for duplicate records.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

### Use Case: 13) DupePreventer's Statistics

|                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>    | DupesPreventer statistics allows User to observe/count duplicate records in salesforce org.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Actors</b>         | Manual or DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Preconditions</b>  | <ul style="list-style-type: none"><li>• The '<b>Activate DupePreventer</b>' checkbox of the DupesPreventer Status page must be turned ON.</li><li>• The '<b>Activate</b>' checkbox of the DupesPreventer Detail page must be turned ON.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Postconditions</b> | After the creation of DupesPreventer Configurations, On Every 'report Duplicate', the User will be able to count block/warn duplicates records based on the configuration.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>• Admin will create DupesPreventer Configurations on Lead To Contact by selecting it from the configuration type picklist.</li><li>• Define 'Action on Insert' by selecting the appropriate value from the picklist</li><li>• Define 'Action on Update' by selecting the appropriate value from the picklist</li><li>• Define the rules based on, which the configuration will be used for deduplication.</li><li>• To make this configuration more rigid, define filters with specific values or conditions.</li><li>• Let's take two examples, one to prevent insert and others for report duplicate.</li><li>• Ex:1<ul style="list-style-type: none"><li>• <b>DupesPreventer Configurations</b><ul style="list-style-type: none"><li>• <b>DupesPreventer Configuration Name:</b> 'Configure'</li><li>• <b>Action on Insert:</b> 'Report Duplicate'</li><li>• <b>Action on Update:</b> 'Report Duplicate'.</li><li>• <b>Configuration Type:</b> 'Lead '</li></ul>Here we let's consider DupesPreventer Configurations on 'Lead'.</li><li>• <b>DupesPreventer Rules:</b><ul style="list-style-type: none"><li>• <b>Match Field:</b> 'City' [<i>Lead match field</i>]</li><li>• <b>Mapping Type:</b> 'Exact'</li></ul>Here let's consider city is =: 'Toronto'.</li><li>• <b>DupesPreventer Filters</b><ul style="list-style-type: none"><li>• <b>Filtered Field Name:</b> 'Company'</li><li>• <b>Operator:</b> '='</li><li>• <b>Filter Criteria:</b> 'BBC'</li></ul>Here let's Consider Company = 'BBC'.</li></ul></li></ul> <p>Create new <b>Lead</b> with LastName= 'Kate', city = 'Toronto' and Company = 'BBC'</p> |

& Save it. Now when User try to insert new **Lead** with LastName= 'Kate, city = 'Toronto' and Company = 'BBC'. Then Dupes-Preventer will allow the user to save records while generating '**Probable Duplicates**' and '**Duplicate Warnings**' on the home page of DupesPreventer Configuration details page.

- Ex:2

- **Dupes-Preventer Configurations**

- **DupesPreventer Configuration Name:** 'Configure'
- **Action on Insert:** 'Prevent Insert'
- **Action on Update:** 'Prevent Update'
- **Configuration Type:** 'Lead '
- **Error Message:** 'Prevent Updating of Duplicate records'

- **DupesPreventer Rules**

- **Match Field:** 'Email'
  - **Mapping Type:** 'Exact'
- Here let's consider email =: '**admin@gmail.com**'.

- **DupesPreventer Filters**

- **Filtered Field Name:** 'Country'
  - **Operator:** '='
  - **Filter Criteria:** 'Canada'
- Here let's consider Country = 'Canada'.

### **Prevent Insert**

Once the DupesPreventer Configurations is complete. Then Admin insert one **Lead** record with FirstName= 'jack', LastName= 'spiro', email = '**admin@gmail.com**' and country = 'Canada'. Records get saved successfully and codes get generated. **Clone the same Lead** and try to save it, Now this record is prevented from saving as the Action was "**Prevent Insert**" in the configuration.

### **Prevent Update**

Create a new **Lead** record with LastName= 'Kate', Company='Bnt', email = '**admin@gmail.com**', country = 'Canada' and save it. Create a new lead record with LastName= 'Robert', Company= 'Bnt', Country = 'Canada' and email= '**abc@gmail.com**' and save it. Now **Edit the Same lead** & try to update Email = '**abc@gmail.com**' to '**admin@gmail.com**'. Now this record is prevented from saving as the Action was '**Prevent Update**' in the configuration.

Once it prevents the 'Insertion' & also 'Updation' of records it displays the Error Message = 'Prevent Insertion of Duplicate records' on-screen along with the Id's of those existing records because of whom this inserting & 'updating' does not occur.

After executing the above two examples, Admin will notify that there are increments in a count of Duplicate Lead Blocked and Duplicate Lead Warned.

- DupesPreventer statistics  
Duplicate Leads Blocked:02

|                     |                                                                                                                                                                                                                                   |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                     | Duplicate Leads Warned: 01                                                                                                                                                                                                        |
| <b>Exceptions</b>   | If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200, then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected. |
| <b>Requirements</b> | DupesPreventer statistics will count block/warnings for duplicate records.                                                                                                                                                        |

### Use Case: 14) Lead Conversion

|                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>    | Allow Leads to be converted into Account and Contact despite the DupesPreventer Application running in the background.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Actors</b>         | User                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Preconditions</b>  | <ul style="list-style-type: none"><li>Manually need to map,<ul style="list-style-type: none"><li>'Lead Record Id' to 'Contacts Lead Record Id' and</li><li>'Lead Record Id' to 'Accounts Lead Record Id'</li></ul></li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Postconditions</b> | The lead will be Converted Inspite of DupePreventer Configuration is active in the background                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>Admin will create DupesPreventer Configurations on 'Lead To Account' by selecting it from the configuration type picklist.</li><li>Define 'Action on Insert' by selecting the appropriate value from the picklist</li><li>Define 'Action on Update' by selecting the appropriate value from the picklist</li><li>Define the Rules based on, which the configuration will be used for deduplication.</li><li>To make this configuration more rigid, You can also define Filters with specific values or conditions.</li><li>Ex:</li><li><b>Dupes-Preventer Configurations</b><ul style="list-style-type: none"><li><b>DupesPreventer Configuration Name:</b> 'Configure'</li><li><b>Action on Insert:</b> 'Prevent Insert'</li><li><b>Action on Update:</b> 'Report duplicate'</li><li><b>Configuration Type:</b> 'Lead to Account'</li><li><b>Error Message:</b> 'Prevent Updating of Duplicate records'</li></ul></li><li><b>DupesPreventer Rules:</b><ul style="list-style-type: none"><li><b>Match Field:</b> 'Company' [<i>Lead match field</i>]</li><li><b>Mapping Type:</b> 'Exact'</li><li><b>Account Match Field:</b> 'Account Name' [<i>Account match field</i>]</li></ul></li></ul> <p>Create a new Lead with LastName= 'Kate', Company Name= 'B&amp;T'.<br/>Create a New Account with Account Name = 'IT' and saved the account.<br/>Now edit this Account and Update Account Name from 'IT' to 'B&amp;T' and save it.</p> <p><i>Before Lead Mapping</i><br/>Now go to earlier created Lead (Company = 'B&amp;T'), Click on Convert button, Org Will Prevent From Converting the lead, because of created configuration and will display the Error Message = 'Prevent Insertion of Duplicate records' on-screen along with the Id's of those existing records (Account record whose Account name = 'B&amp;T') because of whom this conversion does not occur.</p> <p><i>Lead Mapping Steps</i><br/>So to bypass all created configuration during conversion of lead Go to Setup-&gt;Object Manager-&gt;Lead-&gt;Fields &amp; relationships-&gt;Map Lead Fields-&gt;Account Fields-&gt;Select 'Lead Record Id'-&gt;Save</p> |

### *After Lead Mapping*

Now, Go back Again to existing lead with LastName= 'Kate', company = 'B&T', Click on convert button and Lead is Converted into a new Account with the name 'B&T'.

Following Dupes & Warning will generate on Configuration detail page because of Action on Update: 'Report duplicate' Category.

- Dupes Preventor Duplicate Warning
  - DupesPreventor Duplicate Warning Name: Warning No. : 0
  - Configuration Type: Lead to Account
  - DupesPreventor Configuration: **Configure**
  - code: 1| B&T
  - Triggering Action: Duplicate Found on Update
- **DupesPreventor Probable Duplicate Detail:**
  - DupesPreventor Probable Duplicates Name: Dupe-1
  - DupesPreventor Duplicate Warning: **Warning:0**
  - DupesPreventor Configuration: **Configure**
  - Configuration Type:Account
  - code: 1|B&T
  - Duplicate Record: **B&T**
  - AccountId : XXXXXX
  - Object Type: Account
  - Account: B&T
- **DupesPreventor Probable Duplicate Detail:**
  - DupesPreventor Probable Duplicates Name: Dupe-2
  - DupesPreventor Duplicate Warning: **Warning:0**
  - DupesPreventor Configuration: **Configure**
  - Configuration Type: Lead
  - code: 1| B&T
  - Duplicate Record: 'Kate at **B&T**'
  - LeadId : XXXXXX
  - Object Type: Lead
  - Lead: 'Kate'

### Note:

Configuration in which account or lead or both are involved, to avoid such configuration reaction during lead conversion you need to map Lead id with Account id as explain above.

Similarly, for contact related configuration you need to map Lead id with Contact Id.

Process to Map Lead with Contact id is:

Go to Setup->Object Manager->Lead->Fields & relationships->Map Lead Fields->Contact Fields->Select 'Lead Record Id'->Save

You need to map only once at the beginning for both accounts and contact, Once

|                     |                                                                                                                   |
|---------------------|-------------------------------------------------------------------------------------------------------------------|
|                     | mapped no need to worries you can create several different configurations it will not affect the lead conversion. |
| <b>Exceptions</b>   | If the Lead is not Mapped then DupePreventer will not allow converting Lead.                                      |
| <b>Requirements</b> | DupesPreventer required Mapping of Lead Record Id to avoid Prevent insert effect during lead Conversion           |

## Use Case: 15) Permission Sets

|                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>    | Permission sets give authority to admin to give full access or only read access of DupesPreventer Application to any of its user                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Actors</b>         | Manual or DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Preconditions</b>  | <ul style="list-style-type: none"> <li>Define Admin need to assign Permission Sets '<b>DupesPreventer read-only</b>' or '<b>DupesPreventer read-write</b>' as per accessibility he wants to give to that respective users</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Postconditions</b> | <ul style="list-style-type: none"> <li>Target User can reconfigure all records for Duplication Checking</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Flow</b>           | <ul style="list-style-type: none"> <li>Admin will create DupesPreventer Configurations on <b>Lead To Contact</b> by selecting it from the configuration type picklist.</li> <li>Define '<b>Action on Insert</b>' by selecting the appropriate value from the picklist</li> <li>Define '<b>Action on Update</b>' by selecting the appropriate value from the picklist</li> <li>Define the <b>Rules</b> based on, which the configuration will be used for deduplication.</li> <li>To make this configuration more rigid, You can also define <b>Filters</b> with specific values or conditions.</li> <li>Ex:1 <ul style="list-style-type: none"> <li>On Setup -&gt; Search For 'Manage Users' -&gt;Go to 'Users'</li> <li>Click on 'New' &amp; Create new user</li> <li>Save</li> </ul> Here let's consider a new user is,<br/> <b>Username: 'John'</b><br/> <b>Profile: 'Standard User'</b><br/> <b>User License: 'Salesforce'</b> </li> </ul> <p>Note:<br/> Remember All Configuration which is active and working for admin will <b>also be active</b> and in working state <b>for its all users</b> who belong to his Org.</p> <p><b>'DupesPreventer read-only'</b></p> <p><b>Must-Know about 'DupesPreventer read-only' :</b><br/> 'DupesPreventer read-only' Permission Sets give authority to view only Probable Dupes of that respective records. Even the Application name 'DupesPreventer' does not view to a respective user.</p> <p>In this Permission Sets User does not have to right to Read, Create, Edit and Delete the Configuration.</p> <p><b>Step to Assign Permission Sets:</b><br/> Admin need to go to setup-&gt;Permission sets-&gt; DupesPreventer read only-&gt;Manage Assignment-&gt;Add Assignment-&gt;Select User to Whom Admin wants to give ' DupesPreventer read-only' permission-&gt;save.</p> |

If the related list is not added in Admin's Lead, Account and Contact Page Layout then Admin need to Go to page Layout of Lead Object->edit->related list->DupesPreventer Probable duplicates->Save  
Similarly, an Admin needs to do this for Account and contact page layout also.

#### Scenario For 'DupesPreventer read-only' :

##### In Admin Login,

- Create **DupesPreventer Configurations** on Lead
- **Action on Insert:** 'Report Duplicate'.
- **Action on Update:** 'Report Duplicate'.
- **DupesPreventer Rules:**
  - **Match Field:** 'City'
  - **Mapping Type:** 'Exact'

Initially, admin need to assign ' DupesPreventer read-only' Permission to New User = 'John'

Admin also needs to edit lead page layout and need to add ' DupesPreventer Probable duplicates' as mention above.

Now **Admin Login** Create new Lead with lastname= 'Nisha' City=' **Toronto**' and save it. Now go to a **login of new user** = 'John' and here create a new lead with lastname= 'Pooja', City = '**Toronto**'.Dupes are created.

On the detail page of record Pooja which is a new user, you will find,

- **DupesPreventor Probable Duplicate Detail:**
  - DupesPreventor Probable Duplicates Name: Dupe-2
  - DupesPreventor Duplicate Warning: **Warning:0**
  - DupesPreventor Configuration:**ConfigurationName\_1**
  - Configuration Type: Lead
  - code: 1| Toronto
  - Duplicate Record: 'Pooja'
  - LeadId : XXXXXX
  - Object Type: Lead
  - Lead: 'Pooja'

Similarly, on Nisha detail page which is admin, you will find,

- **DupesPreventor Probable Duplicate Detail:**
  - DupesPreventor Probable Duplicates Name: Dupe-1
  - DupesPreventor Duplicate Warning: **Warning:0**
  - DupesPreventor Configuration:**ConfigurationName\_1**
  - Configuration Type: Lead
  - code: 1| Toronto
  - Duplicate Record: 'Nisha'
  - LeadId : XXXXXX
  - Object Type: Lead
  - Lead: 'Nisha'

#### 'DupesPreventer Read-Write' :

|                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                     | <p><b>Must-Know about 'DupesPreventer Read-Write' :</b><br/> Here User has access to Create, Edit, Read and Delete the configuration. He can view or modify any configuration created by admin.</p> <p><b>Scenario For 'DupesPreventer Read-Write' :</b></p> <p><b>In Target User Login,</b></p> <ul style="list-style-type: none"> <li>• Create <b>DupesPreventer Configurations</b> on Contact</li> <li>• <b>Action on Insert:</b> 'Prevent Insert'.</li> <li>• <b>Action on Update:</b> 'Prevent Update'.</li> <li>• <b>DupesPreventer Rules:</b> <ul style="list-style-type: none"> <li>• <b>Match Field:</b> 'Lastname'</li> <li>• <b>Mapping Type:</b> 'Exact'</li> </ul> </li> </ul> <p>Initially, admin need to assign ' DupesPreventer read-write' Permission to New User = 'John'</p> <p>Here User= 'John' can View The Application in his Org. He will be also able to Read, Edit, Create and Delete the new configuration.</p> <p>Create a Configuration as mention above in the target User login.<br/> Now create a new Contact with Lastname= 'Salesforce' and save it(Consider this record Id 'XX1').</p> <p>Clone the Same record and try to save it, It will display record Id = 'XX1' and will prevent record from saving as action mention in the configuration is 'Prevent Insert'.</p> <p>Now go in Admin Login. Create a new contact record with LastName= 'Salesforce' and try to save it,<br/> It will display record Id = 'XX1' and will prevent the record from saving as action mention in target user configuration is 'Prevent Insert'.</p> <p>So here when you assigned 'DupesPreventer Read - Write' Permission Set to any of target users then that target user can Create, Edit, Read and Delete the Configuration.</p> |
| <b>Exceptions</b>   | Target Users will get authority when Permission sets are getting assigned to that target user.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Requirements</b> | DupesPreventer Admin should Assign permission sets as Per accessibility he wants to give it to users                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

### Use Case: 16) Additional Permission Set ‘View all’

|                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>    | DupesPreventer Additional Permission Sets give authority to target user for full access of all records in Org                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Actors</b>         | Manual or DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Preconditions</b>  | <ul style="list-style-type: none"><li>• Check whether <b>OWD is Private</b>(Account/Contact/Lead) or <b>Public</b>. If <b>Public</b> no worries but if <b>Private</b> then <b>follow Postconditions</b></li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Postconditions</b> | <ul style="list-style-type: none"><li>• An <b>Additional Permission Sets</b> with ‘<b>View All</b>’ access for Account Contact and lead Object need to <b>assigned to the Target User</b></li><li>• Also, he can assign ‘<b>View All</b>’ access to all standard object to that <b>Target User</b> by <b>Cloning its the Profile</b></li><li>• A <b>Dupepreventer Permission Sets ‘DupesPreventer read-write’</b> need to <b>assigned</b> to the <b>Target User</b></li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>• Admin will create <b>DupesPreventer Configurations</b> on <b>Account</b> by selecting it from the configuration type picklist.</li><li>• Define ‘<b>Action on Insert</b>’ by selecting the appropriate value from the picklist</li><li>• Define ‘<b>Action on Update</b>’ by selecting the appropriate value from the picklist</li><li>• Define the <b>Rules</b> based on, which the configuration will be used for deduplication.</li><li>• To make this configuration more rigid, you can also define <b>Filters</b> with specific values or conditions.</li><li>• Ex:1</li><li>• <u><b>Admin Detail &amp; Configuration</b></u><ul style="list-style-type: none"><li>• <b>Admin</b> Username: ‘Admin’</li><li>• <b>Profile</b>: System Administrator</li><li>• <b>OWD(Sharing Setting)</b>: Private</li><li>• <b>Dupes-Preventer Configurations</b><ul style="list-style-type: none"><li>• <b>DupesPreventer Configuration Name</b>: ‘Admin Config’</li><li>• <b>Action on Insert</b> : ‘Report Duplicate’</li><li>• <b>Action on Update</b>: ‘Report Duplicate’</li><li>• <b>Configuration Type</b>: ‘Account ’</li></ul></li><li>• <b>DupesPreventer Rules</b>:<ul style="list-style-type: none"><li>• <b>Match Field</b>: ‘Billing City’</li><li>• <b>Mapping Type</b>: ‘Exact’</li></ul></li></ul></li><li>• <u><b>Target User Detail &amp; Configuration</b></u><ul style="list-style-type: none"><li>• <b>Target User Username</b>: ‘Marketing’</li></ul></li></ul> |

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|                     | <ul style="list-style-type: none"> <li>• <b>Profile:</b> Marketing Team</li> <li>• <b>OWD(Sharing Setting):</b> Same As Admin(He Cannot Edit)</li> <li>• <b>Dupes-Preventer Configurations</b> <ul style="list-style-type: none"> <li>• <b>DupesPreventer Configuration Name:</b> ‘Marketing Config’</li> <li>• <b>Action on Insert :</b> ‘Report Duplicate’</li> <li>• <b>Action on Update:</b> ‘Report Duplicate’</li> <li>• <b>Configuration Type:</b> ‘Account ’</li> </ul> </li> <li>• <b>DupesPreventer Rules</b> <ul style="list-style-type: none"> <li>• <b>Match Field:</b> ‘Billing City’</li> <li>• <b>Mapping Type:</b> ‘Exact’</li> </ul> </li> </ul> <p>Create a <b>new account record</b> with account name= ‘Admin Acc’ with <b>Billing City</b> = ‘Jodhpur’ (Consider ID ‘XX1’).</p> <p><b>Admin reConfigure</b> the Configuration (Name: ‘Admin Config’ ) &gt; Click On Reconfigure Code&gt;Process Complete.</p> <p>Here <b>In Admin Report, You will See ‘XX1’ Record ID. In Non-Admin User, You will not See ‘XX1’ Id record.</b></p> <p>Now,<b>Target User Reconfigure</b> Configuration (Name: ‘Marketing Config’) &gt; Click On Reconfigure Code&gt;Process Complete.</p> <p>Here <b>In Admin Report, You will See ‘XX1’ Record ID. In Non-Admin User, You will not See ‘XX1’ Record ID.</b></p> <p>Here <b>Non-AdminUser Does not have access to Admin Records.</b> So even He created Configuration and reconfigured it, the Only record whose owner is he himself, will get reconfigured.</p> <p><b>So to overcome this,</b></p> <ul style="list-style-type: none"> <li>• An <b>Additional Permission Sets</b> need to assigned to target User with ‘<b>View All</b>’ access for Account Contact and lead Object.</li> <li>• Also, he can assign ‘<b>View All</b>’ access to all standard object by <b>Cloning the Profile</b> of that specific non-admin user</li> </ul> <p>After this whenever that <b>target user</b> will <b>reconfigure</b> the code, the <b>all records</b> present in the Org will <b>get reconfigured</b>.</p> |
| <b>Exceptions</b>   | If An Additional Permission Sets is not assigned to Target User then whenever the target user will reconfigure the code, at that time only records whose owner is a target user will get reconfigured                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Requirements</b> | Target User will reconfigure the code, and all records present in the Org will get reconfigured.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

**Use Case: 17) DupesPreventer's ByPass User / ByPass Profile:**

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| <b>Description</b>    | DupesPreventer ByPass User / ByPass Profile allows User to simply bypass for that specific user or profiles. For whom (User or Profile) Admin does not want to give access to DupesPreventers.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Actors</b>         | Manual                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Preconditions</b>  | <ul style="list-style-type: none"><li>• Add By Pass Custom Setting 'Profile' for which DupesPreventer Does not work</li><li>• Add By Pass Custom Setting 'User' for which DupesPreventer Does not work</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Postconditions</b> | If admin bypass any specific user / profile , then dupespreventer will not block for that specific user/profile in case of prevent insert but DupesPreventer will create codes for that users records.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>• Admin will create DupesPreventer Configurations on Lead To Contact by selecting it from the configuration type picklist.</li><li>• Define 'Action on Insert' by selecting the appropriate value from the picklist</li><li>• Define 'Action on Update' by selecting the appropriate value from the picklist</li><li>• Define the rules based on, which the configuration will be used for deduplication.</li><li>• To make this configuration more rigid, define filters with specific values or conditions.</li></ul> <p>Ex:1</p> <ul style="list-style-type: none"><li>• Click on Custom setting &amp; select DP BypassUsers</li><li>• Click on Manage &amp; New</li><li>• Select Location: Profile: System Administrator</li><li>• Save</li></ul> <ul style="list-style-type: none"><li>• Create DupesPreventer Configurations on Lead To Contact.</li><li>• Action on Insert : 'Prevent Insert'</li><li>• Action on Update: 'Prevent Update'.</li><li>• DupesPreventer Rules is on city =: ' Toronto'.</li><li>• DupesPreventer Filters in on Company = 'BBC'.</li></ul> <p>Suppose Admin has a System Administrator.<br/>Insert one Lead with FirstName ='James' LastName= 'Peter', Company = 'BBC' ,city = ' Toronto'<br/>Company = 'BBC'. The lead gets inserted. When Admin clone this Lead &amp; try to save this lead. Again Lead gets inserted, but as per DupesPreventer, this lead should be blocked. But System Administrator profile will be bypass using Bypass custom setting so due to this DupesPreventer does does not block this records but instade it creates codes for that records.</p> |
| <b>Exceptions</b>     | If Bypass will not set, then DupesPreventer will be able to block for that perticular user / profile in case of Prevent Insert                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Requirements</b>   | DupesPreventer ByPass Custom setting should Bypass for specific Profiles or User.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

### Use Case: 18) Mass Insert for Report Duplicate

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| <b>Description</b>    | DupesPreventer Report Duplicate Action allows Users to generate warnings for duplicate records in salesforce org/sandbox.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Actors</b>         | DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Preconditions</b>  | Batch size equal to 1<br>The ' <b>Activate</b> ' checkbox of the DupesPreventer Detail page must be turned ON.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Postconditions</b> | When user insert records by using data loader with Use of Batch API with 1 records per request. It will create Warning and Probable Duplicates by using dataloader.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>• Admin will create DupesPreventer Configurations on Lead by selecting it from the configuration type picklist.</li><li>• Define 'Action on Report Duplicate' by selecting the appropriate value from the picklist</li><li>• Define 'Action on Report Duplicate' by selecting the appropriate value from the picklist</li><li>• Define the rules based on, which the configuration will be used for deduplication.</li><li>• To make this configuration more rigid, define filters with specific values or conditions.</li></ul> <p>Ex</p> <ul style="list-style-type: none"><li>• Create DupesPreventer Configurations on Lead</li><li>• Action on Insert: 'Report Duplicate'</li><li>• Action on Update: 'Report Duplicate'.</li><li>• DupesPreventer Rules is on LastName=: 'ABC'.</li><li>• DupesPreventer Filters in on Industry = 'Banking'</li></ul> <p>When you insert records around 400 in salesforce developer edition with LastName = 'ABC' &amp; Industry = 'Banking' by using data loader with the Use of Batch API with 1 records per request. It will create Warning and Probable Duplicates by using dataloader.</p> |
| <b>Exceptions</b>     | If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200, then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected.<br>To avoid this user will have to set batch size equal to 1 if user insert bulk records through DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Requirements</b>   | DupesPreventer will create warnings for duplicate records.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

### Use Case: 19) Mass Update for Report Duplicate

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| <b>Description</b>    | DupesPreventer Report Duplicate Action allows Users to generate warnings for duplicate records in salesforce org/sandbox.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Actors</b>         | Manual / DataLoader                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Preconditions</b>  | The ' <b>Activate</b> ' checkbox of the DupesPreventer Detail page must be turned ON.<br>Batch size is not equal to 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Postconditions</b> | When user update records by using data loader with Use Batch API with 1 records per request. It will create Warning and Probable Duplicates .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Flow</b>           | <ul style="list-style-type: none"><li>Admin will create DupesPreventer Configurations on Lead by selecting it from the configuration type picklist.</li><li>Define 'Action on Report Duplicate' by selecting the appropriate value from the picklist</li><li>Define 'Action on Report Duplicate' by selecting the appropriate value from the picklist</li><li>Define the rules based on which the configuration will be used for deduplication.</li><li>To make this configuration more rigid, define filters with specific values or conditions</li></ul> <p>Ex</p> <ul style="list-style-type: none"><li>Create DupesPreventer Configurations on Lead</li><li>Action on Insert: 'Report Duplicate'</li><li>Action on Update: 'Report Duplicate'.</li><li>DupesPreventer Rules is on LastName=: 'ABC'.</li><li>DupesPreventer Filters is on Industry = 'Banking'</li></ul> <p>When user update records around 400 for salesforce Developer org by using data loader with Use Batch API with 1 records per request. It will create Warning and Probable Duplicates .</p> <p>To avoid this user will have to set batch size equal to 1 if user insert bulk records through DataLoader</p> |
| <b>Exceptions</b>     | If Admin tries to insert records using DataLoader/Workbench in Parallel mode with batch size more than 200, then there is a probability of mismatched codes getting generated and hence DupesPreventer will not work as expected.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Requirements</b>   | DupesPreventer will create warnings for duplicate records.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |